

\$4.00
PER COPY
PART ONE
OF TWO PARTS

VOLUME 42/NUMBER 5
MAY 1987

C3475-1A-
5/12/87
JDS BUSINESS
-SS: BAKERY
ditions Only

THE MASS MARKET FRAGMENTS INTO REGIONAL AND LOCAL MARKETS



RETHINKING THE SUPERMARKET BUSINESS

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SUPERMARKET BUSINESS Magazine (ISSN 0196-5700) is published monthly by Sosland Publishing Co., 25 W. 43rd St., New York, N.Y. 10036. Telephone: 212-354-5169. Circulated free of charge to grocery retailers and wholesalers. U.S. subscriptions: \$40 per year; Canada, \$45 per year; Foreign subscriptions: \$55 (yearly). \$205 (initial), per year (single copies \$4 except Consumer Expenditures Study (September issue) \$25 per copy. (Discount prices available on multiple purchases.) Copyright © 1987 Sosland Publishing Co. All rights reserved. Second class postage paid at New York, N.Y. and additional mailing offices.

SUPERMARKET BUSINESS

VOLUME 42
NUMBER 5

PART ONE
OF TWO PARTS

MAY 1987

RETHINKING THE SUPERMARKET BUSINESS: THE MASS MARKET IS FRAGMENTING INTO REGIONAL AND LOCAL MARKETS

KEN PARTCH 45

The grocery industry is fragmenting into so many parts that the whole concept of mass marketing is under attack. As this challenge begins to take shape, mass marketing, mass media and even national brands are being reconsidered as the importance of the region, the neighborhood and even the individual is returning.

KROGER ROLLS OUT THE 'WELCOME' IN SOUTH CAROLINA

FRANK HAMMEL & PETER LEVITEN 52

Executives at Kroger explain their late entry into the super warehouse store field as a matter of caution. They wanted to be certain that the format was viable and could be profitable before making a commitment.

ARE BULK FOODS EARNING THEIR SPACE?/PETER LEVITEN 62

It's been several years since bulk foods re-emerged on the supermarket scene. Some items have been washouts, others winners. Here's a look at where things stand.

EL GRANDE: THE NEW WORLD ACROSS THE STREET

PETER LEVITEN 69

The first Hispanic-owned supermarket in the Sunset Park section of Brooklyn mixes products from the Caribbean with a merchandising look that's strictly mainland.

CHICAGO'S PRESIDENTIAL MARKET ELECTS FOR AN UPSCALE CONSTITUENCY/BOB HUGHES 73

A full-scale supermarket in a residential tower near Chicago's Loop hopes to combine the service of a grocery with the style of an upscale boutique.

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CHECKOUT: OF PANDAS, FROZEN FOOD, GEORGE BUSH AND THE DISCOVERY OF AMERICA/FRANK HAMMEL 142

Kroger's Columbus division didn't balk at an opportunity to publicize a frozen food promotion with a far-reaching tie-in.

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*In selected editions only.

STORE PLANNING

How Demographic Changes in the Mid-1980s Will Affect Supermarket Spending Patterns

HIGH-GROWTH PERFORMERS IN FOODS, 1980-1995



Fish and other seafood and fresh vegetables are two of the grocery categories that will show a high rate of growth in food spending between 1980 and 1995, according to a U.S. Department of Agriculture report.

As consumers have less time to shop for and prepare food, supermarket operators need to emphasize quicker service and convenience.

Supermarket management has never been more concerned with the impact of changing demographics than it is now. Ironically, however, the latest U.S. government statistics (for 1985) indicate that the pace of change in demographics and lifestyles has slowed down in the 1980s, after the heady 1970s.

What demographic changes are taking place at mid-decade? And how will they affect grocery buying patterns and supermarket operations in the next five to ten years? To answer the first question, let's look at some statistics.

Growth in household numbers

There were 86.8 million households in the United States in 1985, representing a 7.4 percent increase over the total of 80.8 million reported in the 1980 census. Most of them (62.7 million) were still "family" households, but single-parent families are now the fastest-growing segment of family households.

Of the family households, 12.3 million were single-parent families, while 50.4 million were married couple families. "Traditional" family households (married couple, two children under age 18) in 1985 numbered nearly 9.5 million, representing 10.9 percent of all households. Of these, only 3.5 million households had one working parent and one homemaker parent, representing just 4 percent of all households.

In comparison, married-couple households in which one spouse is working and the other is a home-

maker numbered 14.7 million, representing 17 percent of all households.

There were 24.1 million "non-family" households in 1985, representing a 13 percent increase over the number reported in the 1980 census. This is, however, a dramatic slowdown from the rates of increase in the 1970s: 36 percent between 1975 and 1980, and 30 percent between 1970 and 1975.

Household sizes

The number of people in a household is the single most important determinant of food spending per capita levels. Food spending per person—both away from home in restaurants and "at home" in grocery stores—generally rises as household size declines (see Figure 1, page 39).

The only exception is the decline in spending for food at home from two-person households (\$16.89 per person) to single-person households (\$13.98). Single persons now spend 50 percent of their food dollar on eating out, compared to 40 percent in 1972-73.

The average size of households has continued to decline in the 1980s but at a slower rate than in the 1970s (see Figure 2, page 41). The continuation of this trend means that per capita food spending will increase in real terms, particularly in restaurants.

Declining household sizes will also affect spending patterns on groceries. For example, on a per capita basis, two-person households spend only 5 percent more on cere-

als than do three-person households. But two-person households spend 72 percent more on alcoholic beverages, 61 percent more on cosmetics and toiletries and 41 percent more on fresh fruit.

Incomes

Household incomes have been rising in real terms since the end of the 1980-to-1982 recession. As of 1984, however, they were still below 1979 levels, when inflation was a factor. The failure of "real" incomes to bounce back more strongly since the recession has been partly the result of the declining size of the average household as well as the long-term structural changes now taking place in the U.S. economy.

Incomes obviously have a major impact on food spending patterns. For example, persons in households that earned less than \$5,000 per year (in 1982-83) spent 24 percent less than the average on food away from home. But persons in households that earned \$40,000 + spent 62 percent more than the norm.

Certain contrasts can be found in grocery spending, with some categories (e.g., beef, fish, alcoholic beverages and personal care products) being very sensitive to income levels (see Figure 3, page 41).

In other words, per capita spending on these items increases sharply as household income increases. But other grocery categories (e.g., eggs, cereals and fresh milk) are less sensitive to income. That is, per capita spending on these items is about the same,

regardless of income.

The rate of increase in the number of women entering the labor force has, inevitably, fallen off in recent years. While the proportion of working females to all females grew by about 0.8 percent per year in the 1970s (from 43 percent in 1970 to 52 percent by 1980), the rate of growth since 1980 has fallen to about 0.5 percent per year (to a 54 percent proportion of all females in 1984).

Nevertheless, the continued growth in numbers of working women indicates that supermarket managers should give increasing attention to service and signs in the stores, to make shopping faster and easier. Supermarkets also should be aware of the increased potential for prepared and "quick-cook" foods, delicatessens, and one-stop shopping opportunities.

Age and education

One demographic trend that is accelerating, not tapering off, is the older average age of the population (see Figure 4, page 41).

Although this trend varies considerably among state and local areas, it suggests an ever-growing demand for in-store service as well as growth opportunities for specific



By David Rogers,
DSR Marketing
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STORE PLANNING

HIGH-GROWTH PERFORMER IN NONFOODS, 1980-1995



Instore pharmacies, along with such items as cosmetics, toiletries and nonprescription drugs, will show high growth in food store spending from 1980 to 1995.

BELOW-AVERAGE PERFORMERS IN FOODS, 1980-1995



Grocery categories that are expected to show lower than average growth from 1980 to 1995 include bakery products (top), milk and eggs (middle) and lamb and veal (bottom).

products such as produce and non-prescription drugs.

Shoppers are continuing to become better educated in the 1980s, as they did in the 1970s. The proportion of the population (aged 25 and over) that has a college degree grew from 11 percent in 1970 to 17 percent in 1980 and to 19 percent by 1984.

Implications

This trend will also have predictable effects on grocery spending patterns. For instance, sales of tobacco products will suffer, but sales of books, produce, fish and gourmet groceries will continue to advance.

These mid-decade statistics and

projections may be interesting, but what are their implications for supermarkets?

First of all, lifestyle trends will continue to favor eating out. Therefore, the supermarket industry must continue to emphasize its increasingly successful delis, instore restaurants and prepared foods.

Second, at the aggregate level, the industry must ask itself some very real questions about the prospects for future expansions of convenience stores (with a particular appeal to young males) and of super warehouse stores (appealing to large, young families).

The trending to an older, time-pressured population that lives in

**FIGURE 1
FOOD SPENDING BY HOUSEHOLD SIZE**

No. of Persons	At Home		Percent of Food Dollar Spent Away From Home
	Per Household	Per Person	
AVERAGE	\$35.51	\$14.20	36%
1	13.98	13.98	50
2	33.77	16.89	38
3	42.62	14.21	31
4	53.90	13.48	34
5	63.07	12.61	28
6+	74.88	10.68	23

STORE PLANNING

FIGURE 3
PER CAPITA SPENDING ON SELECTED CATEGORIES
OF FOOD STORE PRODUCTS BY HOUSEHOLD INCOME

(AVERAGE = 100)

	Less than \$5,000	\$5,000 to 9,999	\$10,000 to 14,999	\$15,000 to 19,999	\$20,000 to 29,999	\$30,000 to 39,999	\$40,000 +
Cereals and cereal products	93	105	95	103	103	102	105
Beef	66	82	90	97	107	106	129
Poultry	95	98	100	100	100	98	113
Fish and seafood	65	72	93	87	93	98	152
Eggs	104	112	108	108	100	100	96
Fresh milk and cream	92	97	95	99	102	103	102
Alcoholic beverages	67	72	78	91	95	115	171
Personal care products	77	74	81	88	99	117	154
Nonprescription drugs	64	99	88	69	122	101	135

FIGURE 2
AVERAGE HOUSEHOLD SIZE

Year	No. of Persons
1970	3.14
1980	2.76
1985 (estimate)	2.69
1990 (projected)	2.62

FIGURE 4
MEDIAN AGE OF THE U.S. POPULATION

1970	27.9 years
1980	30.0
1984 (estimate)	31.2
1990 (projected)	33.0

FIGURE 5
PROJECTED INCREASES IN FOOD SPENDING, 1980-1995

(1980 Base = 100)

	1990	1995
Total Food	119	129
Food away from home	124	136
Food at home	116	124
Meat, poultry, fish and eggs	116	125
Beef	116	124
Pork	115	124
Other meat	114	121
Poultry	115	122
Fish	121	132
Eggs	111	117
Cereals and bakery products	114	121
Dairy products	114	120
Milk and cream	110	115
Cheese	118	127
Other dairy products	116	124
Fruits	116	125
Fresh	116	126
Processed	117	125
Vegetables	118	127
Fresh	118	128
Processed	117	125
Sugars and sweeteners	114	121
Fats and oils	116	124
Butter	119	123
Margarine	113	121
Other	114	122
Nonalcoholic beverages	114	121
Alcoholic beverages	123	135
Miscellaneous	116	124

The U.S. Department of Agriculture predicts that consumer spending for food away from home will increase more sharply than spending for food at home in the period from 1980 to 1995. Using 1980 as a base of 100, spending for food away from home will increase 24 percent by 1990 and 36 percent by 1995. Spending for food at home will increase only 16 percent by 1990 and 24 percent by 1995. Selected grocery categories and their projected increases are also shown.

small households tends to favor store formats that feature service, selection and perishables—such as updated conventional supermarkets, superstores and food-drug combos.

Third, significant shifts will occur in grocery spending patterns that will, in turn, have implications for shelf-space allocations. Figure 5, drawn from a recent U.S. Department of Agriculture report, projects how food spending will increase between 1980 and 1995 as a result of these demographic changes and an assumed 2 percent annual increase in incomes. Highlights are as follows:

- Spending for food at home will increase by 16 percent in real terms between 1980 and 1990, compared to a 24 percent increase in spending for food away from home.

- The grocery categories that will show high growth between 1980 and 1995 are: alcoholic beverages (+ 35 percent), fish (+ 32 percent), butter (+ 28 percent), fresh vegetables (+ 28 percent) and cheese (+ 27 percent).

- Grocery categories that will show below-average growth during this period are: milk and cream (+ 15 percent), eggs (+ 17 percent), margarine (+ 21 percent), non-alcoholic beverages (+ 21 percent), cereals and bakery products (+ 21 percent), other meats, such as lamb and veal (+ 21 percent) and sugars and sweeteners (+ 21 percent).

In the nonfoods and general merchandise categories, spending on tobacco products will grow at a below-average rate, while cosmetics, toiletries, nonprescription drugs and medical supplies, and prescriptions will all be high-growth categories.

Finally, nothing is forever. This snapshot of mid-1980s demographic trends shows that some key trends of the 1970s are tapering off and changing. Thus, supermarket managements must keep in touch with their shoppers on a regular basis and not assume that the current trends will continue. ■

NONFOODS BUSINESS

INSIGHTS FOR MANAGEMENT AND THE GM/HBA SPECIALIST

KROGER'S 'WELCOME' GREET'S NONFOODS WHOLEHEARTEDLY

7B

PETER LEVITEN

After waiting for other chains to prove the format's viability, Kroger has opened its first super warehouse store, Welcome, in Greenville, S.C. The 92,000-square-foot store features an instore pharmacy, a 2,500-title video center, a one-hour photo lab, a service perfume counter and a service center. But executives emphasize that this is still a food, drug and health and beauty aids store, so there are few soft goods and appliances.

ARE RETAILERS BECOMING MORE COMMITTED TO GM/HBA? 15B

BOB HUGHES

Many retailers feel that, at last, some manufacturers are beginning to gear their general merchandise programs to supermarkets. More retailers, in turn, are beginning to devote themselves to intelligently planned GM programs.

SAMI UPDATE: SKIN CARE AIDS HELP KEEP TOTAL HBA SALES AHEAD OF 1986 LEVEL 23B

ALAN B. MILLER JR.

Sales of cough and cold remedies dropped in February, but sales of lip care products, as well as hand and body creams and lotions, showed strong seasonal gains. Overall, HBA sales increased 1 percent from their level of a year ago.

MICROWAVES: THE OVENS STAY COOL, THE HOUSEWARES SIZZLE 27B

FRANK HAMMEL

It may well be too late for most retailers to profit from the microwave revolution, as sales move toward the saturation point. But they may be in on the next boom: sustained demand for microwave cookware, which is an easier item to sell in a supermarket because of its lower price points.

THE CHANGING MARKET FOR CONDOMS 40B

DAVID LITWAK

The tragedy of AIDS, and its small but growing move into the heterosexual community, has forced local and federal regulatory agencies to loosen their advertising restrictions on condoms, the best method to prevent the spread of the communicable disease. As more people become aware of condoms' effectiveness through television and print ads, and media coverage, supermarkets are stepping up their marketing and merchandising efforts.

NEW PRODUCTS 32B, 34B, 36B



GM/HBA report 15B



Microwave and microwave 27B

SAMI UPDATE

Skin Care Aids Help Keep Total HBA Sales Ahead of 1986 Level

BY ALAN B. MILLER JR.

Unit sales of the health and beauty aids (HBA) products tracked by SAMI inched forward just 1 percent during the four weeks ending Feb. 27, 1987. Even this small improvement, however, was sufficient to put HBA second in the ranking of product departments, surpassed only by refrigerated foods, which enjoyed a gain of 3.7 percent in units and 4.0 percent in dollars. The dollar gain for HBA was 3.7 percent.

In all five SAMI departments combined, the unit increase was a scant 0.1 percent, while the dollar increase was 1.8 percent. The high-volume dry grocery: food department had a unit loss of 0.9 percent, but dry grocery: nonfoods had a gain of 0.9 percent.

According to estimates provided by the Food Institute in January of this year, real sales at the nation's commercial eating and drinking places rose 6.9 percent in January. If this high rate of gain continued in February, it is possible that reduced food store traffic may have hampered sales, including HBA impulse purchases.

Gains for groups

Five of the eight HBA product groups had increased sales compared to the same period last year, and the other three groups had declines. By far the best gain was the 16.8 percent jump for skin care aids, followed by the 4.9 percent increase for deodorants.

The 3.0 percent loss for proprietary remedies represents a decline of more than 2.7 million units during February. The 4.3 percent loss for shaving needs is from a smaller volume base and translates to a unit decrease of some 734,000 packages. Baby needs declined just 0.2 percent.

Among the 50 categories, declines outnumbered increases 26 to 24. But volume from the two newest categories, dental aids and natural vitamins, minerals and supplements, which do not yet have tracking data for two or more years, evens the score. An increase of 12.8 percent was recorded for dental aids and 20.9 percent for natural

vitamins, minerals and supplements. Sales of cough and cold remedies were down in February, as cold sufferers apparently regained good health. But sales of lip care products, as well as hand and body creams and lotions, were seasonally brisk.

vitamins, minerals and supplements.

Baby needs reverses

In the baby needs product group, some trend changes have occurred since the last reporting period. Now showing gains rather than losses are baby oils, creams and lotions (+ 3.6 percent) and nursing supplies (+ 0.1 percent).

Baby powders, however, moved from a gain in January to a loss of 3.1 percent. The infant clothes category remains weak, although the current loss rate of 14.7 percent is an improvement over the 22.6 percent loss during the previous period.

Virtually all of the 4.9 percent increase in the eight deodorant categories can be traced to the 13.1 percent upswing in stick deodorants/antiperspirants. This increase is the first double-digit rate of gain for

sticks in several months. Roll-ons recorded a gain of 2.3 percent in February, ending several months of losses.

Spray deodorants still recorded a loss, despite two new products in this category, Axis and Trust. Cream deodorants continued to lose sales to sticks, and deodorant and talcum powders recorded a decline of 8.0 percent against a strong year-ago showing of + 14.9 percent.

Feminine hygiene deodorants recorded a loss for the fourth consecutive four-week period, but foot deodorants and athlete's foot remedies moved from a loss to a gain of 4.2 percent. Feminine douche products recorded a gain for the second period in a row.

First aid ascends

Both first aid categories moved ahead, with gains of 17.9

percent for first aid antiseptics and 0.3 percent for first aid products, moving this category out of the loss column.

Four of the seven hair care needs categories recorded gains in February. While shampoos declined 0.6 percent, this was an improvement over the 3.9 percent loss in January.

Hair sprays gained only 9.5 percent, after three months of double-digit gains. Moving from losses in January to gains in February were hair conditioning rinses (+ 2.8 percent), hair setting needs (+ 4.3 percent) and home permanent kits (+ 3.1 percent). Both hair colorings and hair dressing needs continued to lag behind their levels of a year ago.

In the oral hygiene group, mouthwashes showed strong growth as a result of the introduction of two new products, Sucrets and Plax, and a line extension, new Scope peppermint flavor. Unit volume of toothpastes and powders fell 5.5 percent, a greater decline than the 2.1 percent fall in January.

Breath fresheners gained 8.5 percent but on a small volume base. Sales of toothbrushes have



SAMI UPDATE

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO		
	4 WEEKS ENDING 1/2/87	4 WEEKS ENDING 1/30/87	4 WEEKS ENDING 2/27/87
BABY NEEDS	- 4.1%	- 5.2%	- 0.2%
Baby Powders	+ 0.8	+ 6.5	- 3.1
Baby Oils, Creams & Lotions	- 6.3	- 6.5	+ 3.6
Infant Clothes	- 14.9	- 22.6	- 14.1
Nursing Supplies	- 0.9	- 4.3	+ 0.1
DEODORANTS	+ 0.3%	- 1.0%	+ 4.9%
Sprays	- 7.9	- 4.3	- 1.0
Roll-Ons	- 3.0	- 8.6	+ 2.3
Stick Deodorants & Pads	+ 8.5	+ 5.0	+ 13.1
Creams	- 12.3	- 14.2	- 10.8
Deodorants & Talcum Powders	- 0.6	- 2.4	- 8.0
Feminine Hygiene Deodorants	- 4.7	- 7.6	- 4.3
Foot Deodorants & Athlete's Foot Remedies	+ 5.6	- 1.4	+ 4.2
Feminine Douches	- 0.9	+ 5.5	+ 0.9
FIRST AID	+ 0.5%	+ 1.2%	+ 3.8%
Antiseptics	+ 9.1	+ 12.1	+ 17.9
First Aid Products	- 1.7	- 1.5	+ 0.3
HAIR CARE NEEDS	+ 2.0%	- 0.3%	+ 1.6%
Shampoos	- 3.6	- 3.9	- 0.6
Hair Sprays	+ 14.5	+ 11.4	+ 9.5
Hair Conditioning Rinses	+ 3.0	- 0.0	+ 2.8
Hair Setting Needs	+ 8.9	- 2.0	+ 4.3
Home Permanent Kits	- 13.2	- 12.8	+ 3.1
Hair Coloring	+ 3.0	- 3.6	- 15.0
Hair Dressing Needs	- 5.8	- 7.7	- 6.8
ORAL HYGIENE	+ 2.9%	+ 1.6%	+ 2.7%
Toothpastes & Powders	+ 0.9	- 2.1	- 5.5
Mouthwashes	+ 6.5	+ 14.3	+ 30.6
Breath Fresheners	+ 5.4	- 0.0	+ 8.5
Denture Cleaners	- 3.7	- 2.6	- 5.7
Denture Adhesives	- 2.7	- 0.7	- 2.6
Toothbrushes	+ 11.8	+ 5.6	+ 6.7
PROPRIETARY REMEDIES	+ 3.7%	+ 6.4%	- 3.0%
Antacids	+ 1.9	+ 2.4	- 1.0
Internal Analgesics	+ 6.7	+ 5.5	- 3.3
External Analgesics	- 7.6	+ 0.7	+ 0.8
Cold Remedies	+ 6.5	+ 12.6	- 3.2
Nasal Sprays—Drops— Inhalers	+ 1.8	+ 2.1	- 1.1
Chest Rubs	- 3.5	+ 0.6	- 18.8
Cough Remedies	+ 0.6	+ 7.3	- 12.1
Laxatives	- 0.3	+ 3.5	+ 2.1
Sleeping Aids	- 2.9	- 2.1	- 3.3
Tranquillizers	- 18.5	- 20.5	- 13.0
Synthetic Vitamins	+ 20.5	+ 15.9	+ 17.6
Eye Care Products	+ 12.3	+ 12.3	+ 16.7
Appetite Suppressants	- 18.7	- 11.5	- 15.2
SHAVING NEEDS	- 0.9%	- 5.5%	- 4.3%
Shaving Creams	+ 0.7	- 7.4	- 1.2
Pre-Shave Lotions	- 10.9	- 8.8	- 8.0
After-Shave Lotions	- 4.2	- 8.8	- 8.1
Razor Blades	- 0.6	- 4.3	- 5.3
Razors & Blades	- 7.5	- 5.3	+ 1.7
SKIN CARE AIDS	+ 3.6%	+ 10.1%	+ 16.8%
Hand & Body Creams & Lotions	- 3.4	+ 3.6	+ 14.9
Facial Preparations	- 5.7	- 9.4	- 6.3
Lip Care Products	+ 18.0	+ 41.5	+ 49.7
Suntan Lotions & Oils	- 2.3	- 49.3	+ 12.3
Cosmetic & Medicated Skin Aids	+ 5.9	+ 5.9	+ 9.0
TOTAL ALL CATEGORIES	+ 2.3%	+ 2.5%	+ 1.0%



been brisk, partly because of volume contributed by new Aim toothbrushes. On the other hand, sales of both denture cleaners and adhesives have been sliding for many months, with both categories showing downward trends on a four-week, 12-week and yearly basis.

Remedies retreat

Proprietary remedies, which performed especially well in January, retreated as a group in February. Only four of the 13 categories are currently performing better than they did in February 1986: synthetic vitamins (+17.6 percent), eye care products (+16.7 percent), laxatives and stool softeners (+2.1 percent) and external analgesics (+0.8 percent).

The four cough and cold remedy categories moved from black to red ink, topped by losses of 18.8 percent for chest rubs and 12.1 percent for cough remedies. Declines for cold remedies (-3.2 percent) and nasal sprays-drops-inhalers (-1.1 percent) were less pronounced.

Appetite suppressants recorded a double-digit loss for the third consecutive month. Despite new product activity among ibuprofen analgesics, unit volume fell 800,000 compared to a year ago. Antacid volume was 1 percent behind last year, and sleeping aids showed a loss for the fifth consecutive month.

The only gain in the shaving needs group was 1.7 percent in

the low-volume razor set category. Pre-shave and after-shave lotions had losses of 8.0 percent and 8.1 percent, respectively.

Razor blades fell 5.3 percent, although within this category disposable systems (+8.0 percent) are still showing growth. Shaving creams declined for the second month in a row, after an extended period of modest growth.

Lip care flourishes

All five categories of skin care aids showed improvements over January. The only weak one is facial preparations, which showed a 6.3 percent decline. This was slightly better, though, than the 9.4 percent loss registered in January.

Lip care products continued to set the pace with a gain of 49.7 percent. Vaseline Lip Therapy continues to flourish, and Close-up, a new entry in this category, was introduced in 20 markets.

February was a banner month for hand and body creams and lotions, which gained 14.9 percent after a gain of 3.6 percent in January. The gain of 12.3 percent for suntan lotions and oils will have more significance if the rate of increase can be maintained during the spring and summer peak use period.

Finally, the 9.0 percent gain for cosmetic and medicated skin aids indicated good performance, since it came more from established brands such as Neutrogena and Stridex than from new products. ■